

Transfer Ownership—Nonprobate Estate—Nonretirement

Use this form to transfer assets from a deceased account owner's Fidelity nonretirement brokerage or Mutual Fund Only account into another Fidelity nonretirement account. Do NOT use this form for retirement accounts. Type on screen or fill in using CAPITAL letters and black ink. If you need more room for information or signatures, use a copy of the relevant page.

Helpful to Know

- To transfer ownership using this form, the Fidelity account:
 - Must have a value of \$25,000 or less
 - Must be eligible for a nonprobate transfer under the law of the decedent's state, and the decedent's state cannot have small estate provisions
- The deceased owner's account will be closed once all assets have been transferred.

Additional Documentation Requirements

- The account owner's death certificate
- New account application if not transferring to an existing account
- Tax waiver or special affidavit, if required

To determine if you need to obtain a tax waiver, consult the deceased owner's state tax authorities to verify state legal requirements.

1. Deceased Owner's Information

Provide the legal address (domicile) of the deceased owner at time of death. No P.O. Boxes.

Account Number		Deceased Owner's Name	
Address		County	
City		State	ZIP Code
Date of Death MM DD YYYY		Number of Years the Deceased Owner Resided at This Address Prior to Death	
Deceased Owner's Social Security Number			

2. Transfer Instructions

Check one. Transfer ALL assets to this account:

Account Number	Name
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Transfer only a portion of the account, as indicated:

Account Number	Name	
Investment Name/CUSIP/Symbol	Number of Shares/ALL	Percent of Position
		<input type="checkbox"/> ALL %

Account Number	Name	
Investment Name/CUSIP/Symbol	Number of Shares/ALL	Percent of Position
		<input type="checkbox"/> ALL %

Account Number	Name	
Investment Name/CUSIP/Symbol	Number of Shares/ALL	Percent of Position
		<input type="checkbox"/> ALL %

Indicate the number of shares or check "All" or provide the percentage of the position to transfer in WHOLE numbers only. Shares will be transferred on a first in, first out (FIFO) basis.

Form continues on next page. ►►

3. Attorney Certification *Attorney must sign and date.*

Attorney Name		Law Firm Name	
Address			
City		State	ZIP Code
Daytime Phone		Extension	

By signing below, you:

- Certify that you are a licensed attorney of good standing with the law firm indicated in this section, and that you are familiar with the facts relating to the estate of the deceased owner listed in Section 1.
- Certify that the deceased owner was not a resident of any state other than that of his/her domicile within the United States of America at the time of death.
- Certify that all taxes, funeral expenses, debts, and claims against the decedent's estate have been paid or will be paid by the inheritor(s) listed on this form, and that no person, firm, association, or corporation other than the inheritor(s) listed on this form has any right, title, claim, equity, or interest in, to, or respecting the estate, or the shares to be transferred, or the proceeds thereof.
- Certify that a state tax waiver is not required to effect this transfer, or, if required, is enclosed with this form or will be submitted promptly when obtained. If a state tax waiver is required and not submitted, the receiving account will be restricted from all distributions, unless permitted under state law. Once the state tax waiver is received, the restriction will be removed.

Check the appropriate box:

- The deceased owner left a will and the copy provided to me was true and accurate. According to the terms of the will, the recipient(s) is solely entitled to the shares, the distribution of shares to each named recipient is proper under the will, and the transfer of assets of the deceased owner without administration is permitted by the laws of said state.
- The deceased owner did not leave a will and under the laws of intestacy of the state of domicile of the deceased owner, the recipient(s) is solely entitled to the shares, and the distribution of shares to each named recipient is proper under the laws of intestacy of said state.

A Medallion signature guarantee is required if the transfer amount is greater than \$10,000.

If the form is completed at a Fidelity Investor Center with all signers present, the Medallion signature guarantee is not required. You can get a Medallion signature guarantee from most banks, credit unions, and other financial institutions. A notary seal/stamp is NOT a signature guarantee.

PRINT ATTORNEY NAME	
SIGN	ATTORNEY SIGNATURE X
	TODAY'S DATE MM/DD/YYYY X

▼ MEDALLION SIGNATURE GUARANTEE ▼

Form continues on next page. ►►



4. Recipient(s) Signature(s) and Date(s) *All recipients listed in Section 2 must sign and date.*

By signing below, you:

- Direct Fidelity to act on all instructions given on this form and agree to indemnify Fidelity (jointly and severally, for accounts with more than one owner) from and hold Fidelity harmless for any and all losses, liabilities, claims, and costs (including reasonable attorneys' fees) resulting from our effecting any transaction or acting upon such instructions.

PRINT OWNER NAME	
SIGN	OWNER SIGNATURE
	X
DATE	TODAY'S DATE MM/DD/YYYY
	X

PRINT OWNER NAME	
SIGN	OWNER SIGNATURE
	X
DATE	TODAY'S DATE MM/DD/YYYY
	X

Did you print and sign the form? Send the ENTIRE form to Fidelity Investments.

Questions? Go to Fidelity.com/chgacct or call 1-800-544-0003.

Use postage-paid envelope, drop off at a Fidelity Investor Center, OR deliver to:

Regular mail
Fidelity Investments
Account Reregistration Services
P.O. Box 770001
Cincinnati, OH 45277-0039

Overnight mail
Fidelity Investments
Account Reregistration Services
100 Crosby Parkway KC1C
Covington, KY 41015

*On this form, "Fidelity" means Fidelity Brokerage Services LLC and its affiliates.
Brokerage services are provided by Fidelity Brokerage Services LLC, Member NYSE, SIPC. 448602.3.0 (01/16)*

